Event Scheduling Setup Guide

User Manual

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pickatimehelp

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Event Scheduling Setup

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Checklist

In order to create your event(s) you will need to follow these steps:

1. Create the Event

The Event can be the name of your Event, for example, Health Screenings. If you have multiple locations, you may choose to name your events by locations, for example, San Francisco, Bellevue, Seattle.

2. Create Resources on your Event

The Resource will hold the slots. The Resource could the name of the person taking the appointments or it could be a generic entity such as Flu Shots. Depending on your event you might have a single resource, for example, Health Screenings. Or you might have multiple resources, for example, Joe Counselor1 and Joe Counselor2.

3. Create Slots

Create the time slots including the date(s), time of day, duration of appointments etc.

4. Configure Settings

Configure Appointment Settings

Configure Email

Configure Customer User Interface

5. Turn it On and Try it Out

Once you have set up your resources and appointment times you can turn on the display of the appointment booking web page, and view the online scheduler.

Home > Event Scheduling Setup > Step 1: Create Event

Step 1: Create Event

- Log in to your pickAtime account, and select Admin UI from the Account Navigation line at the top. This will open a new browser window and will take you to the Administrative User Interface.
- Select the **Events > Preview** button on the pickAdminUI sidebar.
- Click on the + Add button to add a new event.
- Enter a name for your event, for example, Health Screenings at Seattle Grace, Physical Exams, Counselor Appointments)
- Select type of **normal**
- If you have previously used pickAtime, you will then have a pull down where you can select a template from one of your previous events. The template will determine the starting settings (from the UI Setup, CUI Messages, and the E-Mail Templates pages) for your event.
- Select the event time zone.
- Optionally you can add the Date and Location of your event.

> It is important to enter in the correct time zone as this will be used to open and close the scheduler at the correct time. Also, if you are offering the option for your participants to add their appointment to a calendar, this is the time zone that the appointment will be added in at.

You will then see a row listed for your event. The date does not establish the exact date of your event, the date you enter here is simply a label. You can set it to a range of dates as well. If you have a location for your event that you would like your customers to see then fill in the location.

For any event, you can also use the Event Details box on the screen to fill in any event specific information that you may want in the display of your scheduler or in your emails for this event. Any text that you add the Event Details box will be available as a macro field that you can use in your **CUI Messages** or in your **E-Mail Templates**. The macro for the Event Details is $(E_DESCRIPTION).

You can set up multiple events on your account.

If there is more than one event active when the customer goes to the CUI, they will be presented with a choice of events in a pull-down. Each event is listed with its name, date, and location.

Next Step

Once you have created the Event you are ready to Create the Resources. The resource holds the slots. They can be the specific person that an appointment will be made with or a more generic entity such as a nurse, or the name of the event itself, for example, health screening.

Step 2: Create Resources

The Add Resources function will allow you to set up the resources that will contain your slots.

- Select the **Events > Preview** option on the dashboard. Then select your event from the list and click on the 

 button.
- Select the **Appointments** tab.
- Select the **Resources** drop-down and then click on **Add Resource**. If you are using one of our template events (e.g. Health Screening, Open House) you may already see a Resource column created, in which case you will not need to add in a resource.
- Click in the title area of the new resource and edit the name.

The resource is the entity that holds your time slots. Your resource could be the name of a person (e.g. Dr. Jones) or it could be a generic name such as Flu Shots, or Screenings.

You can add a description for each resource - this option would be available once you check the box 'Display Resources in a list on the right-hand side' which is on the **Settings/Vendor View Setup** page in the Appointments Display section. The Resource Description Editor will show up on the Appointments page at the bottom, once you select a resource on the right-hand side, you would be able to edit the description at the bottom.
FYI: You could use Resource description on the CUI if you set Display Scheduler in a **Date** Format or use a macro for the Resource Description - $(R_DESCRIPTION) - in the CUI Messages.

You can create as many resources as you like. Each resource can hold many slots, but none of the slots can overlap in time on one resource. If you need overlapping slots you will need to create additional resources.

Resources can represent a resource in your business, like a mechanic, or a dental chair. For events like flu shots, you should create just one resource even if there will be more than one nurse at the site because the customer doesn't need to specify which nurse.

Once you have created the Resources, you are ready to Create Slots.

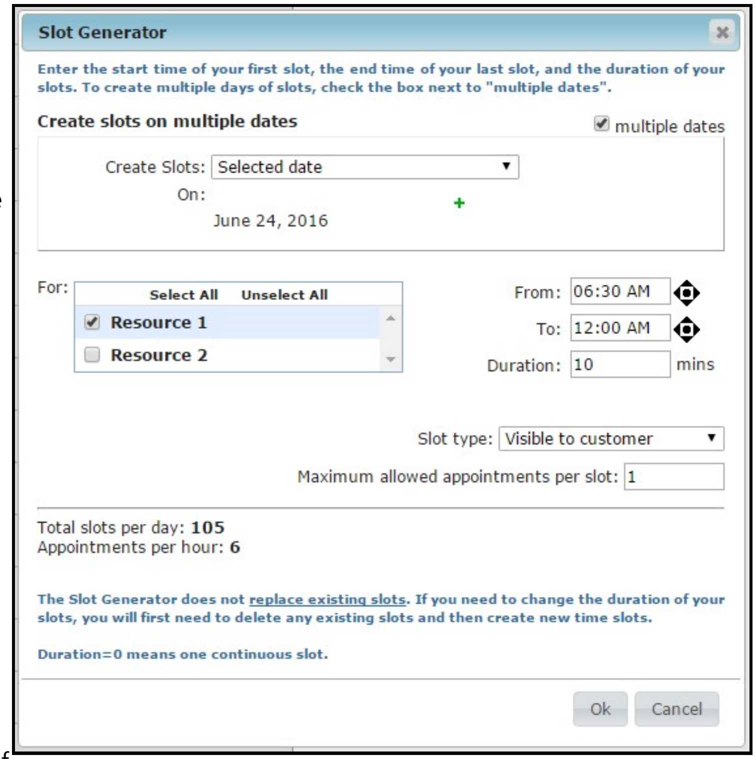
Home > Event Scheduling Setup > Step 3: Create Slots

Step 3: Create Slots

The Slot Generator will generate any number of slots between the **From** and **To** times depending on the duration of the currently selected day. For example, if you want 6 slots per hour of 10 minutes each between 8 am and 5 pm, enter 8:00 am in the **From** field, 5:00 pm in the **To** field, 10 for the **Duration** and 6 in the **Maximum allowed appointments per slot**.

- From the Admin UI select the **Events > Preview** option on the dashboard. Then select your event from the list and click on the 

button.



- Select the **Appointments** tab.
- Select the day you want to create slots on.
- Select the **Slots** drop-down and then select **Create Slots**. This will bring up the Slot Generator dialog box.
- Make sure that you've selected whether you want the slots to be created only on the selected resource(s) or all the resources.
- Enter the start time of the first slot of the day in the **From** field.
- Enter the end time of the last slot of the day in the **To** field.
- Enter the **Duration** in minutes.
- Select what type of slots you would like:

  Visible to customer
  Leave this default setting if you would like the appointments to be visible to your customers.

  Hidden from customer
  Select this if you want the slots to be hidden from the CUI (could be used to reserve slots).

  Shown with "Call" status
  Means that the customer will see these slots if they are available, but when they try to book the appointment they will get a message directing them to call to get this time.

  Make unavailable
  Select this option if you would like the slots to display in the Administration section of the site but not be available to your parents. You will be able to enter a message in the slot (e.g. Lunch Break).

- Enter the maximum number of appointments per slot in the **Maximum allowed appointments per slot** field.

- Select the **Ok** button to create as many slots as can be fit between **From** and **To**.

If you have multiple days of identical slots you can check the box "multiple dates", and create the same slots on more than one day. If your slots are different each day, simply create slots on your first day, then select the next day from the calendar on the left-hand side and repeat the process.

> The Create Slots function does not "redo" any existing slots. For example, if you create slots from 8 am to 12 pm, and then you realize you only needed slots from 9 am to 12 pm, you can not simply “Create Slots” again with your new parameters. You will either need to delete the slots from 8 am to 9 am, or delete all slots and start again.

> If your resource has a generic name such as Nurse or Flu Shots and you can take multiple appointments in any given time slot, you will want to set the Maximum Allowed Appointments per slot to the number of appointments you can take in that slot.
>
> Example: you have 4 nurses who will be doing flu shots every 10 minutes. You would name your resource nurse, and you would create your time slots with a Duration of 10 minutes, and set the Maximum Allowed Appointments per slot to 4.

Updating Slots

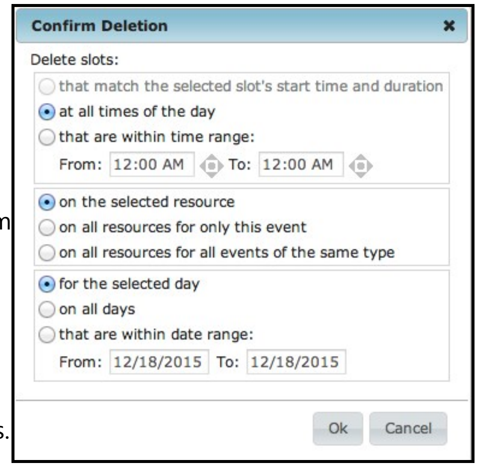
The Update Slots feature will allow you to update the characteristics of existing slots. This feature will allow you to increase the number of allowed appointments per time slot, or to make slots unavailable or hidden to your customers.

- From the Admin UI select the Events option on the dashboard. Then select your event from the list and click on the Go To Event button.
- Select the **Appointments** tab.
- You will see a calendar on the left-hand side. Select the correct date.
- Select the correct resource if you have more than one resource.
- Select the **Slots** drop-down and then select **Update Slots**, this will open up the Slot Updater dialog box.
- The dialog box will allow you to enter in a range of times. You will have several options for making changes to an existing slot.

> Update Slots will only change the characteristics of existing slots. It does not change the duration or start or end time of existing slots.

Remove Slots - individual scheduling exceptions

- From the Admin UI select the Events option on the dashboard. Then select your event from the list and click on the Go To Event button.
- Select the **Appointments** tab.



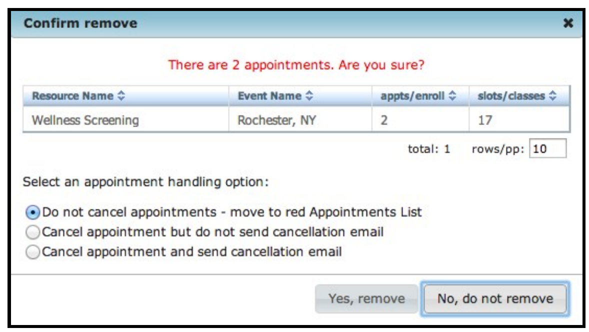
- You will see a calendar on the left-hand side. Select the correct date.
- Highlight the resource column.
- Select the slot that you would like to remove.
- Select **Slots** and then Delete Time Slots; this will open up a Confirm Deletion dialog box
- The dialog box will ask you for details on the deletion. Please read carefully to ensure that you are only deleting slots on the correct date/resource/time combination.

You will be able to delete all slots that occur at that time on all resources. For example, if you want to schedule a lunch break for all resources, you could enter the start and end time of the lunch break and delete any slots during that time.

You can also create breaks by using the **Update Slots** feature and making some slots "hidden" or unavailable.

If you are deleting slots with appointments on them, a second dialog box will come up.

This dialog box will provide you with several options for the appointments that are on your soon to be deleted slots.



- You will have the option of not canceling the appointments. As the slots will be deleted these appointments will be moved to the red Appointments List. From here you will need to attend to these appointments, by either deleting them from the red Appointments List, or by recreating the appointment slot. This red Appointments List is a holding area for "problem" appointments.
- You will have the option of canceling the appointments and not sending a cancellation email.
- You will have the option to cancel the appointment and send a cancellation email. The cancellation email that you have set up in the **Settings > E-Mail templates** page will display and you will be able to edit this or send it as is.

Blocking Slots

You can "block" a slot by turning an existing slot to a red slot and optionally entering in a message for the blocked slot, such as "Lunch Break." In the Admin UI on the **Appointments** page, you would simply click on the x in the corner of a slot. The slot will then turn red and the message "Blocked" will appear in the slot. You can leave that message or edit the message. This slot will then not be displayed on the scheduling page to your customers. At any time you can "unblock" the slot by clicking on the x in the corner and returning the slot to blue.

Blocked Slots will display on your reports when the "show all slots" option is checked.

As an alternative to blocking slots, you can always delete slots.

Making Changes to your Slot Start Times or End Times or the Duration

In order to modify your slots after they have been created, you will need to first delete the existing slots. The **Create Slots** process will not simply override slots that you have previously created. For example, if you have created 10-minute slots from 8 am to 2 pm, and you now decide that you would like your slots to run from 9 am to 1 pm, you can not create this new slot scenario on top of your existing slots. You must either delete the slots from 8 am to 9 am, and from 1 pm to 2 pm, or delete ALL slots and then create new slots from 9 am to 1 pm.

Move Slots

The **Move Slots** feature will allow you to move all your slots and appointments (if any) to a new date. The **Move Slots** option will bring up a dialog box where you can enter a destination date for your slots and appointments to be moved to. You will have the option of sending an explanation email to all customers with an appointment. You also have the option to move the slots only for a selected resource or resources.

Important Note: new calendar notification emails will not be sent, so participants should be advised to update any calendar entries they have set.

Copy Slots

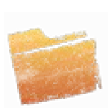
The **Copy Slots** feature will allow you to copy one day of slots to another day.

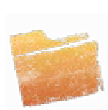
Next Step

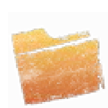
You are now ready to configure the settings for your event. Start with Appointment Settings.

Home > Event Scheduling Setup > Step 4: Settings

Step 4: Settings


Appointment Settings


Configure Email


Configure Customer User Interface

Home > Event Scheduling Setup > Step 4: Settings > Appointment Settings

Appointment Settings

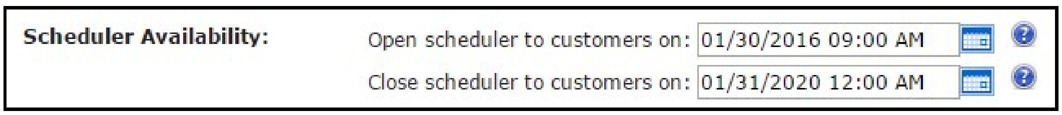
From the **UI Setup** in the **Settings** tab, you can alter under what conditions the slots will appear to your customers.

- From the Admin UI select the Events option on the dashboard. Then select your event from the list and click on the 

button.
- Select the **Settings** tab and then the **UI Setup** tab.

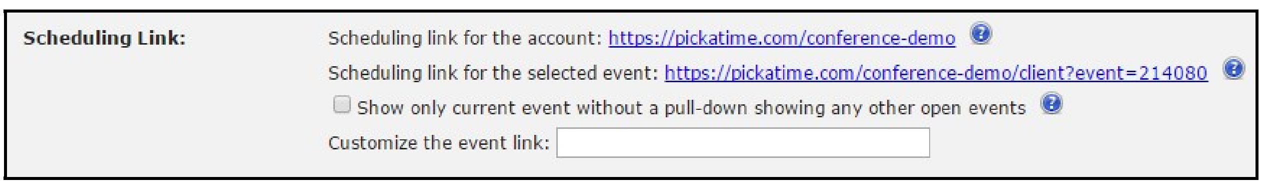
From the top of the page, work your way down:

Scheduler Availability



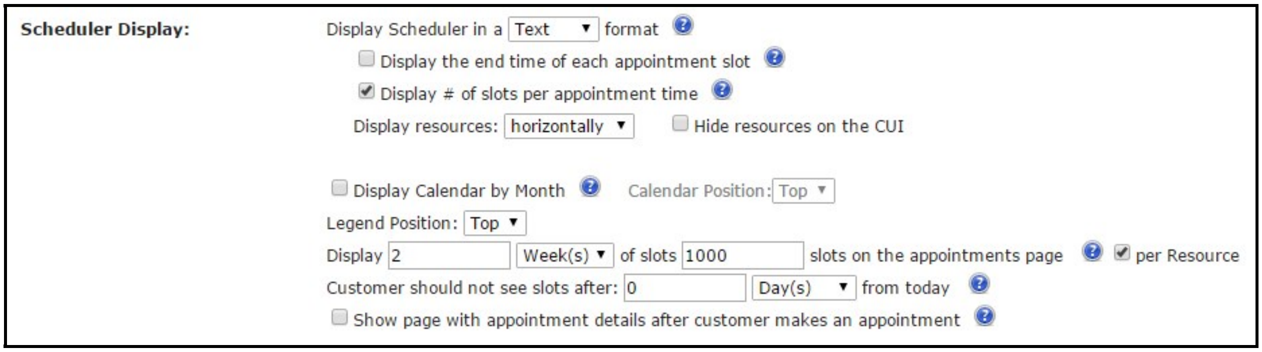
- **"Open scheduler to customers on"** Enter the date and time that you would like the scheduler to be open to your participants.
- **"Close scheduler to customers on"** Enter the date and time that you would like the scheduler to be closed to your participants.

Scheduling Link



- The **"Scheduling link for the selected event"** lists the site address for the selected event that you can either use on your school web page or provide to participants in an email to use when booking an appointment. If you click on this link a new browser window will open up that is the Customer User Interface (CUI) for your event. You can also enter a customized event name. This will then be appended onto your account URL. For example, if you have customized your event URL to https://pickatime.com/anyorg, your custom event URL might look something like this: https://pickatime.com/anyschool/LA or https://pickatime.com/anyschool/NY. Note, that when using the custom event URL's the customer will still have the option to toggle to any other open event on the account.
- Check **"Show only current event without a pull-down showing any other open events"**, and then provide the 'Appointment URL for Event' to your customers, if you would like them to see the scheduler for the current event only.

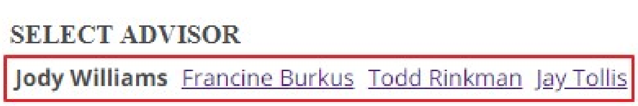
Scheduler Display Options



- There are five formats for the display of slots to the participant: Table, Text, List, Vertical and Date.
  Set format to Text to get a text listing of the available time slots. If Text display is selected you will also have the option to display the end time of each appointment, the number of available appointments per slot, and you will be able to display each resource in a pull-down. You will also have the option to "hide the resource" so the resource name will not display on the scheduling page.
  In the Text display scheduler format you would be able to set the 'Display resources' view option (Horizontally; Vertically; In pull-down):

Horizontally

On the Online Scheduler resources would be listed horizontally in one line.



Vertically

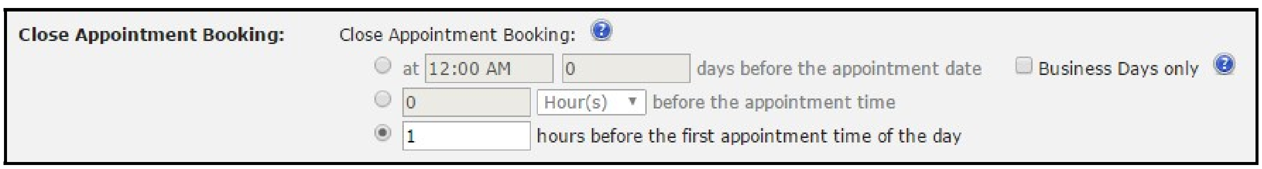
On the Online Scheduler resources would be listed vertically.
NOTE: in the Vertically mode you can check the box 'Display resource description'.
To set up the Resource Description, you should go to the Settings/Vendor View Setup page, Appointments display section, here you can check the box 'Display resources in a list on right-hand side'.
Then, on the Appointments page, you would see resources on the right-hand side, once you select the resource at the bottom of the page the Resource Description pop-up will show up. Select the pop-up and edit the resource description for the selected resource.

Set format to Table to get a graphical listing.
Set format to List to get a list of available appointments. List type could be adjusted on the Settings/CUI Messages - List View.
Set format to Vertical to get a vertical list of available times (appointments). Vertical type is available only

with the CUI template: new. (Global Setup/Business Setup -> Other Settings - CUI Template). With Vertical user interface format, you can use an option: "Display time slots in three columns: Morning / Afternoon / Evening". See Example.
Set format to Date to get a Date list of available times (appointments). Date type is available only with the CUI template: new. (Global Setup/Business Setup -> Other Settings - CUI Template). With Date user interface format, you can change the name of the Resource on the CUI. See Example.

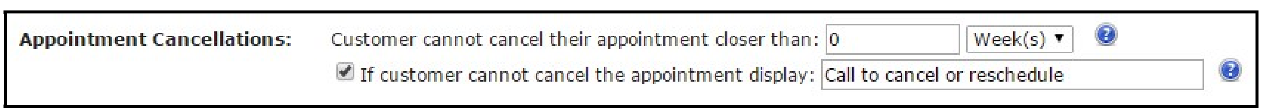
- **Display Calendar by Month** will display a monthly calendar either above or to the left of your available appointments. The customer can then click on an available date on the calendar to see the availability for that day.
- **Legend position** can be set to either the top or the left. If you select a legend position of "left" you will also have the option of a separate legend per child, and if you have imported a class name you have the option of having the class name displayed after the teacher name. **Important Note:** In order to have the class name available on the printable schedule, you must have the legend position set to the left, and check the box "separate legend for each child" along with the box "show class names." Otherwise, the participant is booking an appointment with a teacher, but not a teacher and class combination.
- Check the **"Show page with appointment details after customer makes an appointment"** box if you would like a web page with appointment details to pop up after the customer has made an appointment.

Close Appointment Booking



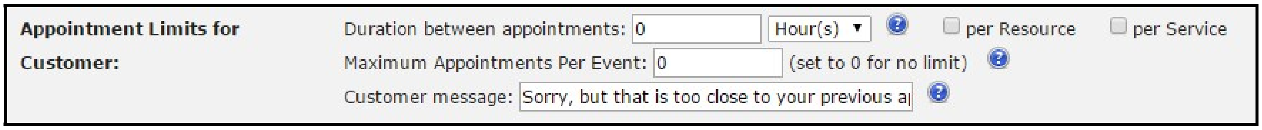
- **"Close Appointment Booking"** allows you to make slots become unavailable some amount of time before the appointment. There are 3 options. Close appointment booking at XX time XX days before the appointment date. Close appointment booking XX hours before the appointment time. Close appointment booking XX hours before the first appointment time of the day.

Appointment Cancellation



- If you want to prevent participants from canceling their appointment within some amount of time before the appointment change **"Customer cannot cancel their appointment closer than X hours/days/weeks. "** Set this to 0 if you do not care if participants cancel a minute before they show up. Set this to a large value if you don't want them to be able to cancel the appointment.
- Check the box "**if customer cannot cancel the appointment, then display 'call to cancel' message"**, if you would like participants to see a 'call to cancel' message. You may also want to enter a number for the customers to call to cancel.

Appointment Limits for Customers

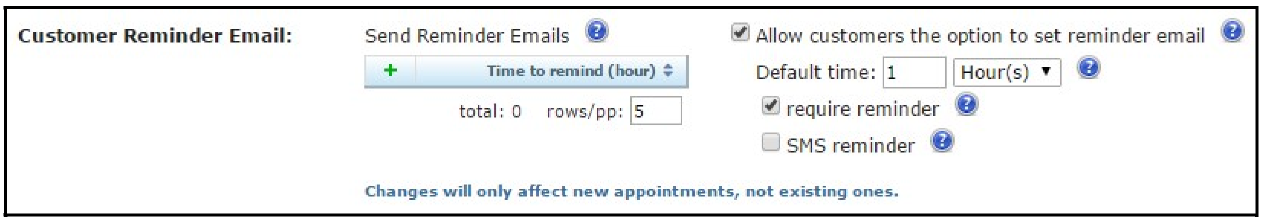


The appointment limit section is where you can set limits on how many appointments a customer can make.

- When **"Duration between appointments"** is set to a non-zero value the system will not allow the customer to make a second appointment closer than the setting. If they attempt to make one the "**customer message**" will be displayed. You can limit this by resource or by service.
- **"Maximum Appointments Per Event"** prevents the customer from creating more than the allowed appointments per event. When they attempt to make too many the "**customer message**" will be displayed.

Customer Reminder Email

You can require email reminders and set the time in advance. Select Add and enter in the time (in hours) prior to the appointment that you would like an email reminder to be sent. You can add multiple times here for multiple email reminders.



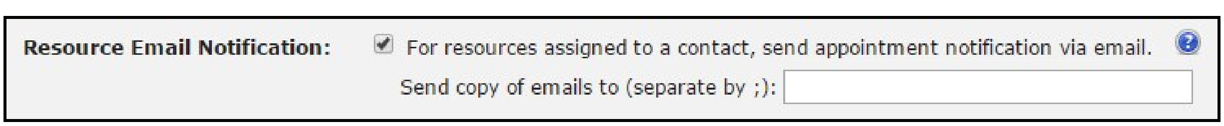
You can require email reminders and set the time in advance. Select Add and enter in the time (in hours) prior to the appointment that you would like an email reminder to be sent. You can add multiple times here for multiple email reminders.

Or you can allow your customers the option of whether they want an email reminder and when. The customer can select how much time before their appointment it should be sent, but you can set the default value that will be shown to them.

- Check the **"set from CUI"** if you want to allow your participants to set the default time to receive a reminder email.
- Set **"require reminder"** to force your customers to receive a reminder email.
- If you check both **"require reminder"** and **"set from CUI"** your participants will be able to select when the reminder email will be sent, but will not have the option of not receiving an email.
- check **"SMS Reminder"** Allows you to send SMS text message reminder to appointment holder.
  NOTE: *option upon request. Additional fees are charged.

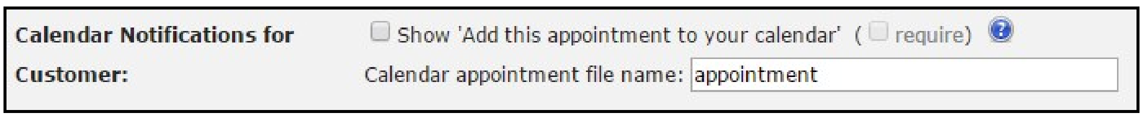
IMPORTANT NOTE: The automatic reminder email will be created at the time the customer books the appointment. Once the appointment is booked, if you add a new automatic reminder time this will only apply to subsequent appointments booked.

Resource Email Notification



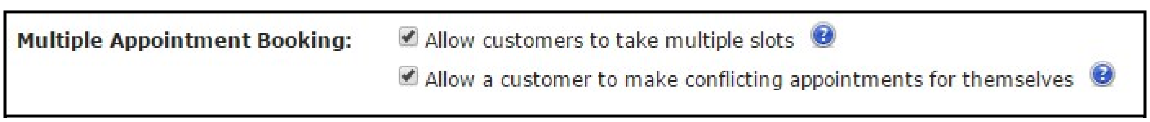
- Check the box "**for resources assigned to a contact**, **send appointment notification via email"** if you would like a calendar notification email to be sent to the resource (i.e. teacher, counselor) each time a customer makes an appointment. For Gmail users, the appointment will automatically be added to their calendar, for Outlook users the appointment can be added to their calendar directly from the email.

Calendar Notification for Customer



- Check the box Show "Add this appointment to your calendar" to provide your participants with the option of receiving an email calendar notification. Check the box 'require' if you would like the confirmation email to your participants to always include the calendar appointment notification. For Gmail, the appointment will automatically be added to the customer's calendar.
- **Calendar appointment file name:** allows you to enter a name that the appointment file will be labeled.

Multiple Appointment Booking

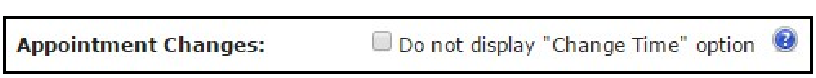


- Check the box "Allow customers to take multiple slots" if you would like your customers to be able to book more than one slot for the same appointment time.
- Check the box "**Allow customer to make conflicting appointments for themselves**" if you would like your customers to be able to book more than one appointment at the same time.

Cancel Past Appointments

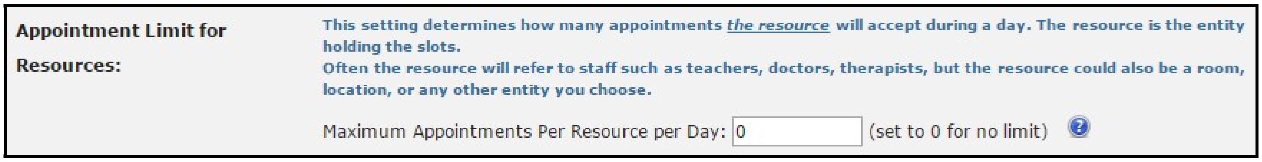
- Check the box "**Allow customers to see and cancel past appointments**" if you would like your customers to be able to see and cancel past appointments.

Appointment Changes



- Check the box "**Do not display 'Change time' option**" if you would like your customers would not be able to change the time of the booked appointment.

Appointment Limit for Resources



- **"Maximum Appointments Per Resource per Day"** allows you to set a limit of how many appointments per resource can be booked on any day. For example, you can create 15 slots on a day, but restrict the Maximum Appointments for the resource to 10. As soon as the 10th appointment is booked at any time on that day, no more appointments can be booked.

Adjust Appointments Displayed

- **"Adjust Allowed Appointments"** allows you to display only part of the available appointments per slot on the Online Scheduler. This feature can not be used if you are using 'Services' which hold more than one slot. Also if you are using Customer user interface type Text with 'Hide resources on the CUI' activated, then you can not use 'Adjust Allowed Appointments' feature.
- **"Minimum for the start"** allows you to set the number of appointments per slots which you would like initially to show up on the scheduler.
- **"Filled up"** - this option is set to 100% as the default but can be adjusted. Once 100% (or your selected %) of slots are booked, a new set of slots will open up for booking. Note, that this will never exceed the 'Maximum Allowed Appointments per slots' you set when creating the slots.

Administrator Email Notification

This will allow you to receive an email when the slots for an event reach a specified %full.

Next Step

You are now ready to Configure Email.

Home > Event Scheduling Setup > Step 4: Settings > Configure Email

Configure Email

On the **E-Mail Templates** page in the **Settings** tab, you can adjust various settings specific to your event.

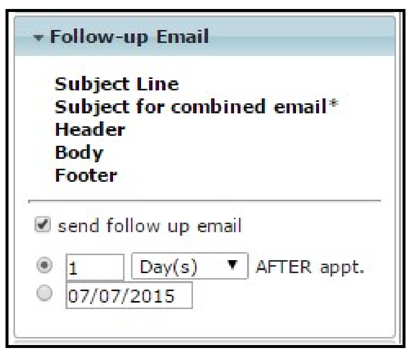
- From the Admin UI select the Events option on the dashboard. Then select your event from the list and click on the 

button.

- Select the **Settings** tab and then the **E-Mail Templates** tab.

The system can send five different emails.

- **Confirmation Email** - sent after the appointment is booked, either by the parent or the administrator. This email will be sent if you have checked the box "send confirmation email" at the top of the page.
- **Reminder Email** - sent some amount of time before the appointment, or when the administrator selects the **Send Reminder** button from the **Appointments** tab. You have the option of requiring a reminder email to be sent or letting the customer choose the option and selecting how long prior to the appointment the reminder email should be sent. The reminder email option is set on the **Settings/UI Setup** page (see the section on Appointment Settings for more details).
- **Cancellation Email** - sent when the customer or administrator cancels the appointment.
- **Custom Email** - allows you to send an email on an ad hoc basis. A custom email is sent only from the Appointments List page. On that page, you would locate the specific appointment or appointments that you wanted to send an email to, and then you will have the option to send Custom Email.
- **Follow-up Email** - sent some amount of time AFTER the appointment is taken. You have the option of selecting how long AFTER the appointment is taken the follow-up email should be sent. This email will be sent if you have checked the box "send follow up email" at the 'Follow-up Email' section. This is an email that would be used to send AFTER the event (e.g. for a survey or questionnaire).



On the left-hand side, you can select the Confirmation Email, the Cancellation Email, the Reminder Email or the Custom Email. You can then select Subject Line, Subject for combined email, Header, Body, or Footer and view the text for these sections of your email template. You will have the option of editing the default text and using the toolbar to format your text.

The fields beginning with $ are Macro fields, and they will fill in with contact and appointment specific information.

$(C_FIRST) $(C_LAST) is the first and last name of the contact person -- the person logging into the scheduling site and booking the appointment. This name is captured when the contact person first registers.
$(TIME) is the time of the appointment booked
$(D_LONG) is the date of the appointment booked
$(D_LOCATION) Location of the Appointment (entered under the Calendar on the Appointments page) - useful for events with numerous dates, when the location(room) may be changed for some date, this macro could be used.

To view all the Macro options, select the Insert Macro button at the bottom of the page.

To edit (or view) the HTML, select the HTML icon (<>) on the toolbar.

You have the option to provide a support email address to receive emails when your customers reply to any of the three email types. Enter in an email address in the **Reply To Email Address** area and any time a parent selects

"reply" to the confirmation, reminder, or cancellation emails the reply email will be sent to the ***reply to email address*** you specify. If you leave this blank, any replies will receive an automated email response.
The **Reply To Email Address** will apply to all events on your account.

The Subject for combined email is the subject line that will be used when multiple appointments have been booked, canceled, or modified. The text for each appointment transaction is "stacked" into one email. The system will use the Subject for combined email text in this "stacked" email subject line.

Next Step

You are now ready to Configure Customer User Interface.

Home > Event Scheduling Setup > Step 4: Settings > Configure Customer User Interface

Configure Customer User Interface

The pickAtime system allows you to modify many of the text messages that your customers will see when booking appointments.

- From the Admin UI select the Events option on the dashboard. Then select your event from the list and click on the 

button.
- Select the **Settings** tab and then the **CUI Messages** tab.
- You can select any of the labels on the left-hand side. The right-hand side will display the text that will show up on the CUI. The text on any of these labels can be changed.
- To edit the title on the login page for your scheduler, select Login page / Login message at the top* and edit the text on the right-hand side.
- To add a logo to your scheduler, select Other / Account Logo*. Select the Insert drop-down and then select Insert image. Here you can enter the source URL for your image. If you only have a jpg for your image, you can email this to support@pickatime.com and request that we add this to your account.
- Macros can be placed in the text and the system will replace the macro with the corresponding text. For example "You are scheduling an appointment with $(V_NAME) $(R_NAME), at $(TIME) on $(D_SHORT),
 for the $(E_NAME) event." is an example of the message that will be displayed on the appointment confirmation page. The "$(V_NAME)" macro will be replaced with your vendor account name when the system sends the page to the customer's browser.

Some of the macros you may want to use:

V_NAME Vendor Name

R_NAME Resource Name

E_NAME Event Name

TIME Time of Appointment

D_SHORT Date of the Appointment (in short format)

E_LOCATION Location of the Appointment (entered in the Event Setup section)

D_LOCATION Location of the Appointment (entered under the Calendar on the Appointments page) - useful for events with numerous dates, when the location(room) may be changed for some date, this macro could be used.

A complete list of the macros can be found by selecting the **Insert Macro** button at the bottom of the page.

To edit (or view) the HTML, select the HTML icon (<>) on the toolbar.

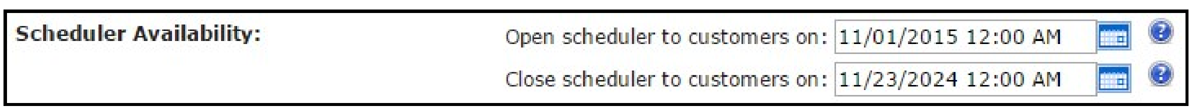
Next Step

You are now ready to turn on your event.

Home > Event Scheduling Setup > Step 5: Turn It On and Try It Out

Step 5: Turn It On and Try It Out

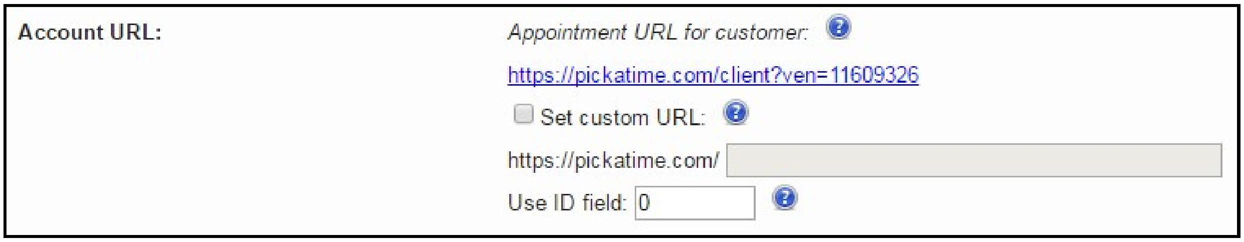
- From the Admin UI select the **Events > Preview** option on the dashboard. Then select your event from the list and click on the Go To Event button.
- Select the **Settings** tab and then the **UI Setup** tab.
- To turn on the online scheduler so customers can use the website and schedule appointments, modify the **"Open scheduler to customers on"** and the **"Close scheduler to customers on".**



To test out the site as if you were a customer you will need to have your testing dates fall within the Start day of appointment taking and End day of appointment taking.

View for yourself the appointment booking web page. The appointment URL is listed in the Account URL section at the bottom of the **Business Setup** page under the **Global Setup** tab. To test out the system you can click on the URL or copy and paste this URL into another browser window and try out the site as if you were a customer. You can customize this URL by checking the box "Set custom URL" and entering in your preferred URL name in the white box.

The Appointment URL will change to reflect your selection, and the new URL will be available in approximately 5-10 minutes.



If you receive the error message "There are no events currently available" or "the online scheduler is closed" then you probably have not yet set the "Start day of appointment taking" and "End day of appointment taking" settings that are on the **Settings > UI Setup** page. Any days that you want to make available for customers to schedule appointments should be within the start and end date specified. Also, in order to test the site your testing date needs to be within that date range.

Once you have tested the scheduler and are satisfied that it is set up correctly, you are done and you can share the link with your clients.

Home > Event Scheduling Setup > Advanced Setup Options

Advanced Setup Options

Topics in this Section

- **Collect Information from your Participants**
- **Allow Participants to Take Multiple Slots**
- **Customer URL's**
- **Category Options**
- **Direct Participants to specific event(s)**
- **Restrict Access to the Scheduler**
- **Whipple Hill / BlackBaud SSO Setup**
- **Importing Options**
- **Credit Card Setup**

Home > Event Scheduling Setup > Advanced Setup Options > Collect Information from your Participants

Collect Information from your Participants

There are two places where you can collect additional information from your customers. The first is when the customer logs in for the first time and creates an account -- this is contact specific information. Any information that you want to collect here is set up in the **Global Setup / Contacts** page. The second place you can collect information is when the customer clicks on an appointment time. These fields are set up on your event pages in the **Settings / Appointments Fields** section.

Both pages work in a similar fashion.

Go either to the **Global Setup / Contacts** page or the **Settings / Appointments Fields** event page.

Enter in your new field in the **Add New** box. For example, DOB, mm/dd/yy or Phone Number.

This field will then show up in the Available fields section. Use the < button to move it to the Included Fields section.

There are several options for each field that is in the included set.

	required for customers If this is checked, then during sign-up a red asterisk (*) will be next to the field and parents must input information on that line.
	required for admins If this is checked, then during sign-up a red asterisk (*) will be next to the field and administrators must input information on that line.
	hidden from customers This field would be hidden to your parents.
	ID Field These field is used when the school imports a list of parents to enable the parent to use the imported account. Using an ID field you can limit access to the event, by requiring your parent to provide a matching value in the ID field.
	PW Field PW field is similar to the ID field, except that the values that the customer types in will be hidden as password fields are. Please contact customer support for more information.
	repeat for each slot booked This type of field is used when you are allowing your participants to take multiple slots at the same time - this is not an option on the PTA product.
	show separator before field This will add a line below your field
	display on all reports Check this box to automatically display this field on all reports

Type column

The type column will allow you to specify the type of field you have created. The options are Text, Num, Date, Choice, Header, and Sub-Header. Header and Sub-Header are informational fields, the participant will not be responding to a prompt.

Create a question with preset answers
To create a list of answers to your question (e.g. Yes, No) use the drop-down under the Type column and select Choice. You will then see a question editor where you can fill in your first answer in the entry box below your question. Click on Add New to create more answers.

You have the option of a drop-down list, radio boxes, or check boxes for your responses.

Use the <> option to rearrange your responses.

You can follow directions on the "Contact/Appointment field with questions" page to create a question with preset answers.

Reporting

To view your collected appointment fields in the Reporting section, click on the Additional report fields link, select Appointment fields and check the box next to each field you would like to add to your report. Click on the **Save Report Settings** button to save these selections on your report.

To view your collected contact fields in the Reporting section, click on the Contact report fields link, select Appointment fields and check the box next to each field you would like to add to your report. Click on the **Save Report Settings** button to save these selections on your report.

IMPORTANT NOTES:

Fields you create in the **Contacts Setup** page will be collected when the participant FIRST creates their account.

Fields you create in the **Appointment Fields** page will be collected when the participant clicks on a time slot.

First Name, Last Name, and E-Mail address are collected when the participant registers.

Allow Participants to Take Multiple Slots

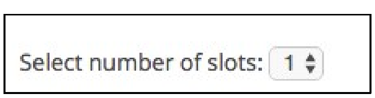
Allowing customers to take multiple slots

This would be used when you want to allow one login to take multiple appointment slots at the same time.

Some examples might be:

- a parent booking flu shot appointments for three children
- a parent booking a school tour for mom, dad, & child or siblings
- a supervisor registering multiple team members for an event.

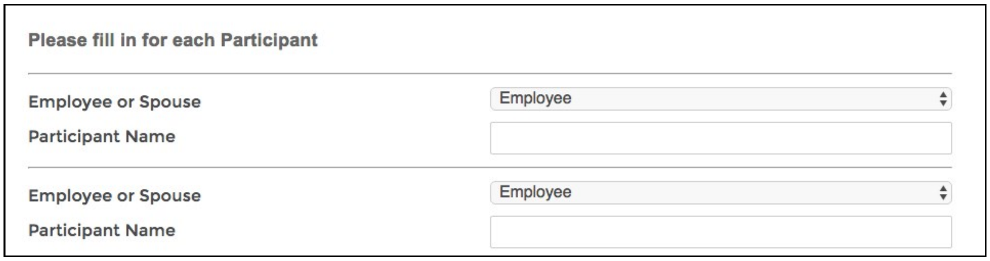
To enable this feature go to the Settings / UI Setup page for your event and select "allow customers to take multiple slots." On the scheduling page, this will display a pull-down above your slots, where the customer can select the number of slots they wish to book. They will never be able to book more than the number available at any given time. See below for an example:



The text ('Select number of slots') can be edited on the Settings / CUI Messages page under Schedule / Select number of slots message.

You will most likely also want to capture information on each slot this is being booked -- such as the name of the person participating or attending. You would do this by going into the Settings / Appointment Fields page for your event, and creating new fields you would like filled out for each appointment. An example might be "Participant Name."

Check the box under the column for "repeat for each slot booked" to create a repeating prompt. For example, if a participant selects 2 slots, and you have created a repeating prompt labeled Participant Name, they will be prompted to fill out this field for each slot. See example below:



Customizing your Email

When you select the option of allowing your customers to take multiple slots, you will want to adjust your email templates. When multiple appointments are created at the same time, we send only one email. The email will contain one header section, one footer section, and then a body section for each appointment made. This means that any text you ***do not*** want repeated you should put in the header or the footer, not the body.

For example, if you would like your email to read something such as:

> Dear Joan Smith,
>
> Thank you for scheduling the following appointment(s):
>
> John Smith at 2:00 on July 15, 2012
> Sue Smith at 2:00 on July 15, 2012
> Billy Smith at 2:00 on July 15, 2012
>
> Please arrive early to find parking. We look forward to seeing you.

On the Settings / E-Mail Templates page you would enter your text as follows:

> **Header:**
> Dear $(C_FIRST) $(C_LAST),
>
> Thank you for scheduling the following appointment(s):
>
> **Body:**
> $(AF_PARTICIPANT_NAME) at $(TIME) on $(D_LONG)
>
> **Footer:**
> Please arrive 15 minutes early to find parking. We look forward to seeing you

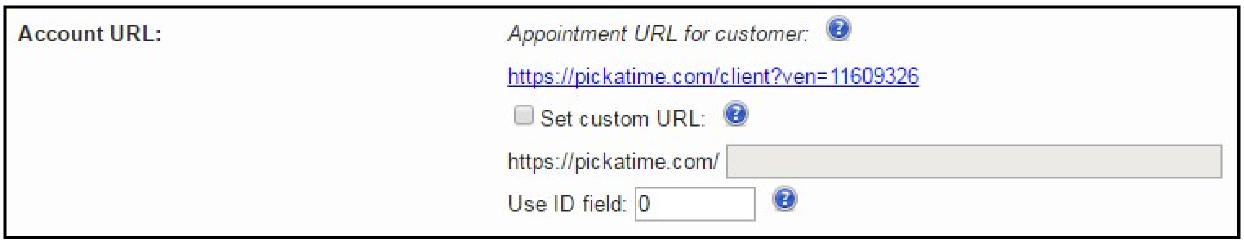
The fields beginning with $ are Macro fields, and they will fill in with appointment specific information.

$(C_FIRST) $(C_LAST) is the first and last name of the contact person -- the person logging into the scheduling site and booking the appointment. This name is captured when the contact person first registers.
$(TIME) is the time of the appointment booked
$(D_LONG) is the date of the appointment booked
$(AF_PARTICIPANT_NAME) is the name of the participant who will be taking the appointment slot. This name will be entered by the contact person when the appointment is booked. This field was created on the Settings / Appointments Fields page for your event by adding in a new field called Participant Name.

Customer URL's

Account URL

When you create an account with pickAtime, a URL is assigned to your account. This account URL, which will be the Customer User Interface, is in the format: https://www.pickatime.com/client?ven=XXXX where XXXX is your vendor ID. This URL is displayed on the **Global Setup > Business** page on the bottom left-hand side. This URL will display ALL open events on an account. For example, if you have 5 open events on your account, when the participant logs in they will see a table listing the 5 different events, and they will be able to select an event from the list.



Custom Account URL

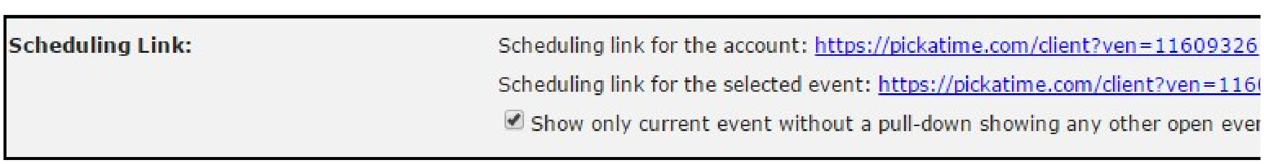
You can customize this URL by checking the box "set custom URL" and then entering in the white entry box what you would like the XXX part to be in https://pickatime.com/XXX. For example, if you would like your URL to be https://pickatime.com/mycompany you would enter in mycompany in the white entry box.

Important Note: You should not use an &, ?, =, or other special characters in your URL.

Event URL's

Each event on an account has a unique eventID associated with it. This event ID can be appended to your account URL. This event specific URL will take the customer directly to that event when they log in. This event URL is displayed on the Settings > UI Setup page for the selected event. The event URL is in this format: https://pickatime.com/client?ven=11600096**&event**=EVENTID

At the top of the UI Setup page you will see the URL for the selected event. Each event on an account has a unique event number which can be included in the URL to take the participant directly to that event.



IMPORTANT NOTE: The event URL you see listed on this page will take the customer directly to the event. However, if you have any other open events on your account you the event table will be displayed to the customer and they will be able to toggle to the other events. Check **"Show only current event without a pull-down showing any**

other open events", and then provide the 'Appointment URL for Event' to your clients, if you would like them to see the scheduler for the current event ONLY. When you check this box the URL will change slightly with the &event parameter changing to &evt.

Custom Event URL's

The event URL can be customized on the **Settings > UI Setup** page. Under the Appointment URL for event there is an entry box where you can enter an event name. This will then be appended onto your account URL. If you have customized your account URL as in the example above, your custom event URL might look something like this: https://pickatime.com/mycompany/training or https://pickatime.com/mycompany/flushots.

IMPORTANT NOTE: When using the custom event URL's the participant will still have the option to toggle to any other open event on the account.

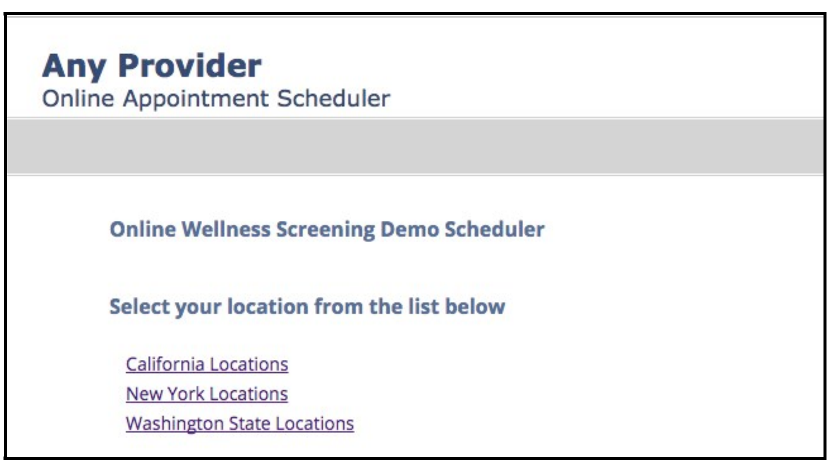
Home > Event Scheduling Setup > Advanced Setup Options > Category Options

Category Options

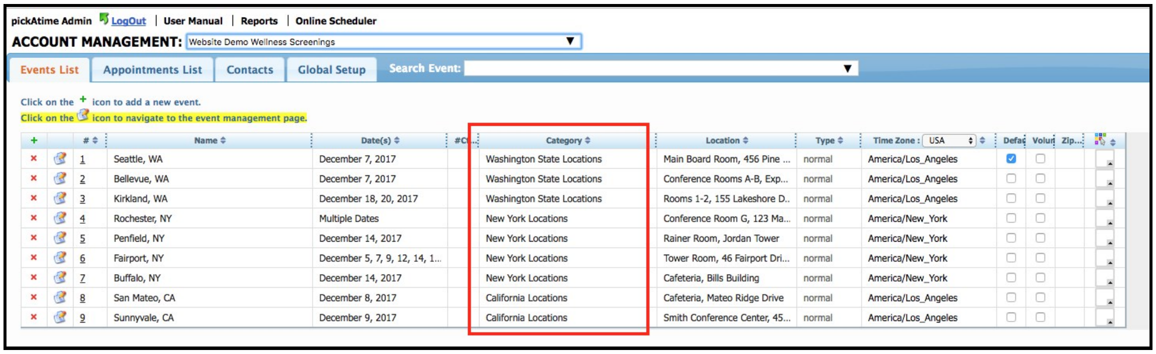
Category is a column on the **Events > Preview** page. This column is used when you want to categorize your events and display a list of categories to your participants before displaying the event. For example, you might want to organize your events by state or city. To do this you would enter in the state or city for each event in the Category column.

To "turn on" this initial sort you would go to the **Global Setup > Business** page and check the box "first category sort." Your participants would then see a list of your categories when they first logged into the scheduler. When they selected a category they would see a table with the events under that category. If you would prefer to have the initial display in a pull-down then check the box "show category in the pull-down."

For example, here is the initial login page of a scheduling site that has categorized each event by state and has an initial state sort.



The **Events > Preview** page for this account looks like below. You will see how the Category column on the **Events > Preview** page is filled in with a category description which is then used as the initial sort on the account.



In addition, the fields entered in the category column can also be used to create URLs for a category. This would be used when you have created a custom URL for your account. For example, if the URL for your account was set to https://pickatime.com/croquetlessons and you were offering croquet lessons in 5 different states with multiple locations within a state you could enter in the state abbreviation in the category column. Then your URL for Washington would be https://pickatime.com/croquetlessons/wa. Participants would be able to toggle to the other states, but they would be directed first to Washington state.

Check the box "category selector not displayed" if you would like to restrict participant access to ONLY the category used in the URL.

IMPORTANT NOTE:

In order to have a custom URL AND have the other events hidden you need to use our Category feature and a customized account URL.

On the **Events > Preview** page, enter in text in the Category column for each event.

On the **Global Setup > Business page** create a customized account URL for your company, such as https://pickatime.com/nameofyourcompany

For example, if you wanted the event URL to be https://pickatime.com/nameofyourcompany/flushots then enter in flushots in the category column. This would then be the URL you would provide to your participants.

Then on the **Global Setup > Business** page check the box "first category sort" and "category selector not displayed."

Home > Event Scheduling Setup > Advanced Setup Options > Direct Participants to specific event(s)

Direct Participants to specific event(s)

You can restrict participant access to a specific event or events on your account. This is done by adding in a field on the Contacts Field page called EventID. On your import file, you would then include a column labeled EventID and fill the column with the eventID (the #) that the participant should have access to. If a participant should have access to more than one event, then separate each eventID with a semi-colon. When that participant logged in they would

ONLY see the event they had access to.

For example, you have two events, Retirement Meetings and Retirement Meetings Plus (for senior executives). The EventID for Retirement Meetings is RM-123. The EventID for Retirement Meetings Plus is RM-ABC.

Participant A should only see the Retirement Meeting when they login. Participant B should only see the Retirement Meeting Plus when they log in.

Your import file would look like this:

ID	First	Last	EventID
1	Joe	Smith	RM-123
2	Fred	Barnes	RM-ABC

The EventID for each event can be found in the Reporting Section. Select the Account Reports option, and then select the report labeled Settings.

Home > Event Scheduling Setup > Advanced Setup Options > Restrict Access to the Scheduler

Restrict Access to the Scheduler

There are two ways you can restrict access to the scheduler.

Restrict access based on Email Address

Import your list of participants with an email address and then only allow access to participants who have been imported to your account. See the Importing People section of the site. Once you have imported your list of participants, then on the **Global Setup / Business** page check the box labeled "Do not allow self-registration." This is under the Advanced Options -> Restrict Registration section. The only people who can access your scheduler are participants that have been imported through our People Importer or manually entered into the Admin UI.

Restrict Scheduling Access based on an ID or Registration Code

The pickAtime Online Scheduling system allows you to import unique ID #'s or Registration Codes which will allow you to restrict access to only participants that provide a valid ID or Code when they log into the scheduler.

1 - Create your People File

This file lists the people to be imported.

- **ID** identifies the person
- **Last** last name (optional)
- **First** first name (optional)

ID	First	Last
1	Joe	Smith

2	Fred	Barnes
3	Jennifer	Readman

- This table must be provided in a tab-delimited text file
- The first row should contain the column title

NOTE: The last name and the first name fields are optional, so your file can be as simple as one column with an ID field in it.

2 - Adjust Settings

Prior to importing your people file, you must add the ID field in the Administrative User Interface.

- Select the **Global Setup > Contacts** tab.
- Enter in the name of your ID field (in this example, we have simply called it ID) in the white entry box.
- Use the less than sign (<) to move this field from the Available Fields list to the Included Fields list.
- Check the box under *required field, and check the box under *ID field.

3 - Import your file

- Log in on the pickAtime home page (www.pickatime.com) at the Client Login section
- Select Importer
- Select Data Type of People
- Select ID for the Field ID
- Locate your file and import

4 - Add restriction option to your URL

- Locate the ID field number and add this on the **Global Setup > Business** page in the Use ID Field entry box. Your ID number is located on the Report Selection page. Select the **Account Reports** radio button, and then select the report labeled Settings.
- Once you have entered this ID in the entry box you will see the URL for your account updated to include additional arguments.

Additional Restrictions

You can restrict participant access to a specific event or category. This is done by adding in a field on the Contacts Field page called either EventID or CategoryID. On your import file, you would then include a column labeled EventID or CategoryID and fill the column with the eventID (the #) or the Category name. When that participant logged in they would ONLY see the event (or category) they had access to.

Whipple Hill / BlackBaud SSO Setup

In order to use the SSO option with your event, you will need to import your data from Whipple Hill / BlackBaud. As there is not an import process that will ONLY bring in parents from WH / BlackBaud you will need to create a "dummy" PTA event and import all academic data as this will bring in the required parent data.

Adjust Settings

- Select Client Login from the pickAtime home page and log in with your email address and password to your pickAtime account.
- Click on the Admin UI link at the top of the page.
- Select Global Setup and then Business Setup
- Locate the Single Sign On section (Advanced options) and set the SSO Provider pull-down to Whipple Hill.
- Enter in your **Whipple Hill School Login ID** in the School System Login/ID: area. This will indicate to our system that you are a Whipple Hill school and that you will be importing data directly from Whipple Hill. This ID field is a Whipple Hill value and is typically an acronym for your school. This can be located in Core>Settings>Demographics.
- In the SSO login URL box enter in your school website address.

Create PTA Event

- On the Events List page, click on the green + sign and add in a new event of type PTA. This event required for the WH / BlackBaud import process.

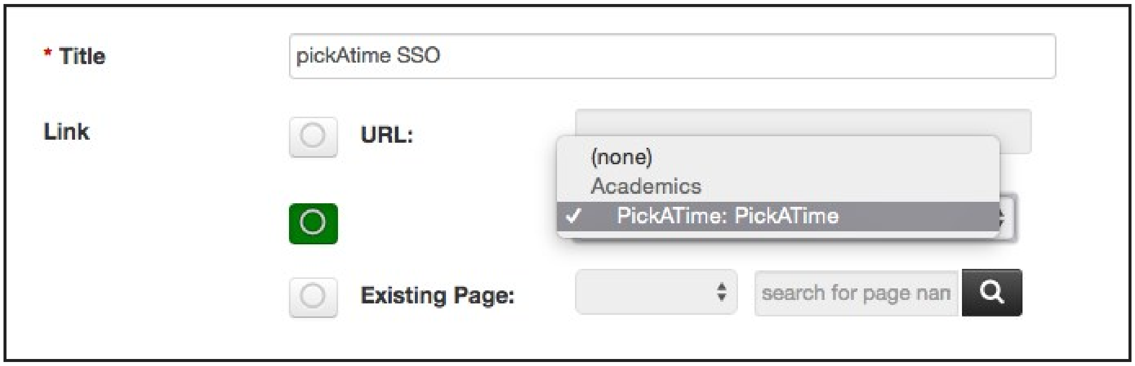
Import Data

- On the Report Selection page, select Importer. You will be prompted for your Whipple Hill credentials. You will need to log in here with the Whipple Hill credentials that have been given the Web Service API role in Podium. You will then be prompted for the School and Term to import.

After doing the import, parents will be added in as contacts to your account and will be able to login to the pickatime link.

Create Link

- If you have an onMessage website, go to onMessage > Content > Links
- If you do not have an onMessage website, or if you are a Content Manager rather than a Platform Manger, go to Core > Communication > Content Types > Links
- Create a new Link Category
- Set the "Security" to the roles you wish to utilize the link
- Save and Add Link
- Name the link
- **Do not choose the URL method**. Instead, choose the middle method with the drop-down option. Within the drop-down, choose your pickAtime integration



- Save Link

To post the link you can:

1. Create resource board post to be a direct link to pickAtime
2. Add the link to a resource board post detail page
3. Add the link to an onCampus group bulletin board (course pages, community group pages, advisory pages, etc.)

Try Out the scheduling link

- Be sure to try out the scheduling link by impersonating a parent.

Home > Event Scheduling Setup > Advanced Setup Options > Importing Options

Importing Options

There are multiple options for importing to your event or account.

Importing Events

Importing People

Importing Appointments

Importing Slots

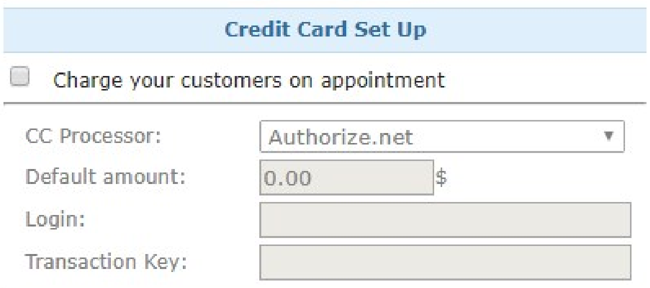
Home > Event Scheduling Setup > Advanced Setup Options > Credit Card Setup

Credit Card Setup

PickATime has an integration with 4 Credit Card Processing providers:

Authorize.net	**PayPal**	**First Data**	**MySchoolBucks**

In the Admin UI tool, once you open your event, go to the Settings/Credit Card Setup page:



Check the box 'Charge your customers on appointment'

Select a proper CC Processor from the drop-down

If you have the same cost for all your appointments, then you enter this value here (i.e. $10.00).

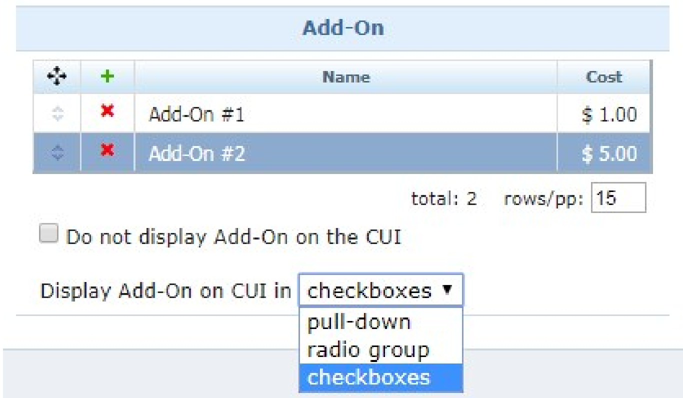
If you have numerous *services* with a different cost per service, then enter a zero value in this field.

Enter your Login and Transaction Key for the selected CC Processor

Any appointment cancelations when payment has been made will need to be made by an Admin, in the Admin UI. Payment refunds would then need to be made in the back-end with your payment processor.

Add-On options

The **Add-On** option appears right after the **Credit Card Setup** section if the '**Charge your customers on appointment**' box is checked.



Add-ons are only available if you are charging your customers per appointment. If the option 'Charge your customers on appointment'
is not checked, then the 'add-ons' would be hidden (greyed out).

You can add an unlimited number of add-ons.

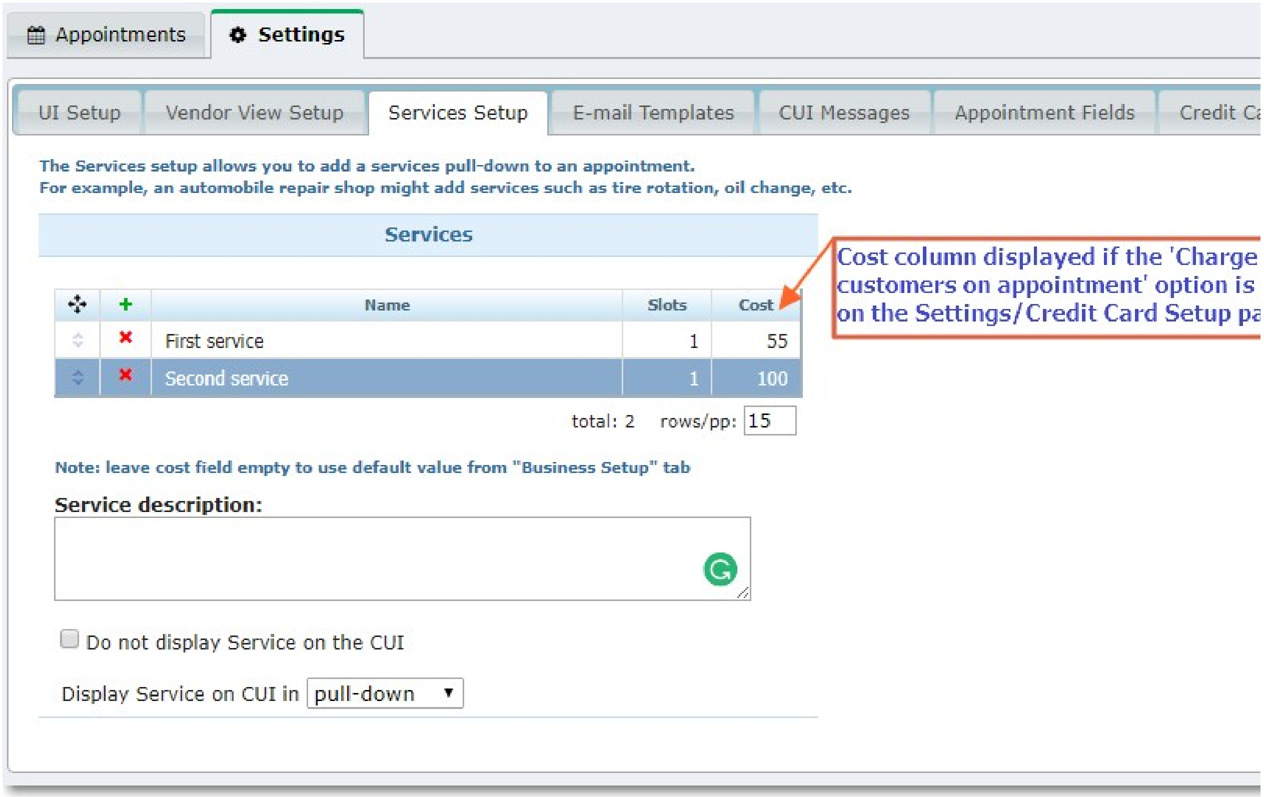
If you check the box '**Do not display Add-On**' on the CUI - the add-ons would be hidden for customers.
This can be used if you want to temporarily switch off add-ons, but do not remove them.

There are three options to display add-ons:
checkboxes - customers would be able to select multiple add-ons
pull-down and **radio group** - customers would be able to select only one add-on from the list of available add-ons

Selected Add-Ons could be added to the E-mail Templates or CUI Messages via a macro. For example, if you want to add information about an add-on to the appointment Details page you would do the following.
On the CUI Messages/Other/Details page, on the right-hand side select Insert Macro button, on the pop-up window click Appointment/Add-On Name. **$(ADDON_NAME)**

Service options

If you have numerous services with a different cost for each service, then once you adjust settings on the **Settings/Credit Card Setup** page, you should go to the **Settings/Services Setup** page. Here you can add in multiple services, each with a different price.


Appointments
Settings
UI Setup
Vendor View Setup
Services Setup
E-mail Templates
CUI Messages
Appointment Fields
The Services setup allows you to add a services pull-down to an appointment.
For example, an automobile repair shop might add services such as tire rotation, oil change, etc.
Services
Name
Slots
Cost
First service
1
55
Second service
1
100
total: 2
rows/pp: 15
Note: leave cost field empty to use default value from "Business Setup" tab
Service description:
Do not display Service on the CUI
Display Service on CUI in pull-down